

## Table of contents

- [About](#)
- [Properties](#)
- [Basics](#)
- [Behavior Tab](#)
- [Defaults Tab](#)
- [Helpers Tab](#)
- [Knowing When to Transfer Records](#)
- [Transferring Records](#)
- [Transferring an Item ID](#)
- [Transferring a Call Number](#)
- [Transferring a Title](#)
- [Video Tutorial](#)
- [Transferring Items](#)

## About

This article and video tutorials (below) cover how to transfer records in the MSC. The examples in this article were generated on the TEST server by the MSC Trainer and not the result of any libraries mis-cataloging.



You won't be able to edit other libraries' holdings unless you've earned "supercataloger" credentials. If you see another library's record that may need to be transferred, please open a [help desk ticket](#).

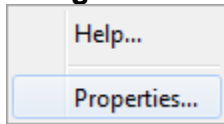
---

## Properties

### Basics

Properties are workstation specific. To adjust properties:

1. **Close** the wizard that you want to adjust if it's already open.
2. **Right-click** on the wizard name and select **Properties...**



3. At the top of the window where it says **Display property page**, select **Never**.

Display property page: ☐ Wizard Startup ☒ Never



If you select **Wizard Startup**, the properties window will open every time you open the wizard, and any changes you make to the properties will only last for the duration of the session.

4. If you have questions about settings, consult the [Knowledge Base](#) or press **F1** (WorkFlows Help).
5. When you're finished making changes, click **OK**.
6. When you close WorkFlows, select **Yes** when prompted to save changes.



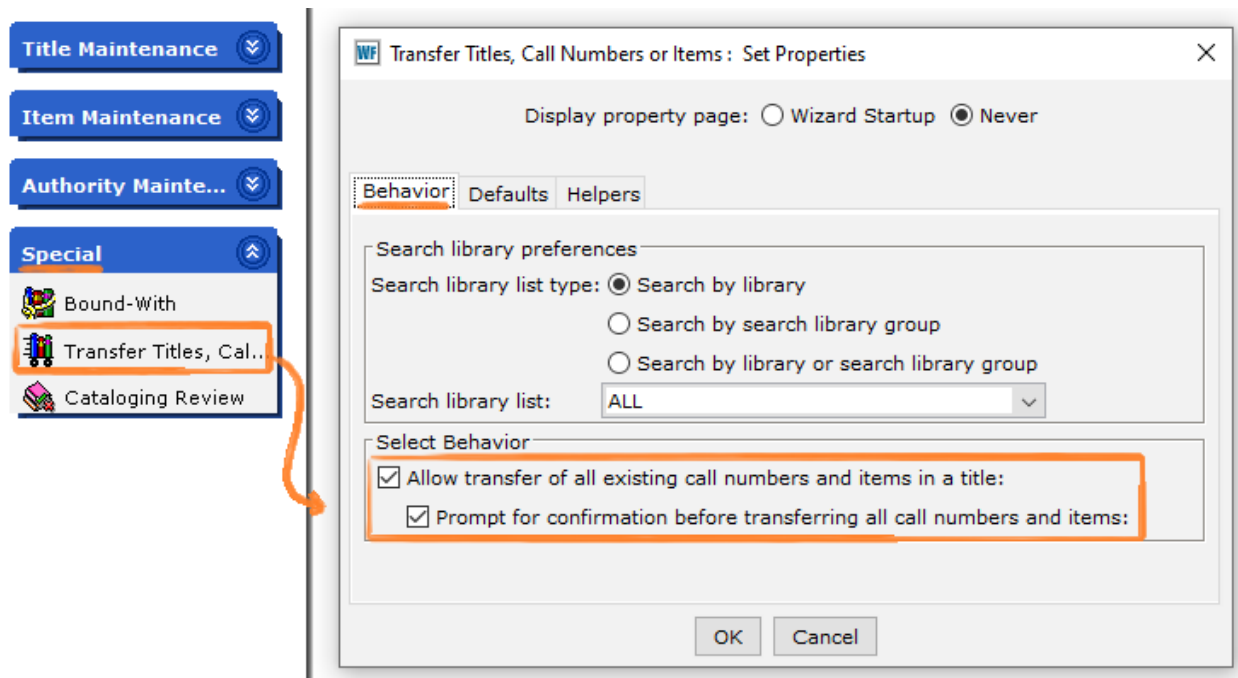
Properties have been changed. Would you like to save changes?

Yes

No

## Behavior Tab

### Select Behavior Section



**Allow transfer of all existing call numbers and items in a title:** You need to check this box to be able to transfer a record when it's the last copy of something, for example the last call number and / or item attached to a bib record.

**Prompt for confirmation before transferring all call numbers and items:** Check this box if you want a confirmation pop-up to display before transferring a title.

Click **OK**.

## Defaults Tab

The Defaults tab can be left alone.

## Helpers Tab

The Helpers tab can be left alone.

## Knowing When to Transfer Records

You typically need to transfer a record when:

1. There is a **better bibliographic record available** for you to attach your item to (in the case of duplicate records).
2. Your item is attached to the **wrong bib record entirely**.

Transferring a record (as opposed to discarding and re-adding it) will **retain circulation statistics and local settings; however, your OCLC records won't be updated to reflect the transfer**. You'll need to update your library's OCLC holdings manually.



You won't be able to edit other libraries' holdings unless you've earned "supercataloger" credentials. If you see another library's record that may need to be transferred, please open a [help desk ticket](#).

## Transferring Records

You can transfer:

- an **item ID**, which will become an additional copy attached to an existing call number (if your library already has holdings on the preferred record).
- a **call number** that has one or more item IDs attached to it.
- a **title / bib's holdings**, meaning multiple call numbers and their item IDs.



Item ID level



Call Number level



Title/Bib record level

### Transferring an Item ID

Let's say you accidentally added the DVD *Harry Potter and the Deathly Hallows: Part 2*, to the bib record for *Harry Potter and the Deathly Hallows: Part 1*. Here's how you would transfer the item to the correct call number on the correct bib (assuming you already have a copy of *Part 2* cataloged correctly).



Transferring an item ID to a new call number means it will "lose" its original call number in favor of the one you add it to. It will appear as an additional copy on the new call number. In the following example, the call numbers are identical.

1. Open the **Transfer Titles, Call Numbers or Items** wizard (Cataloging module > Special Toolbar > Transfer Titles...).
2. Look up the **item you want to transfer**.

- a. If you have the item in hand, simply select **Item ID** from the **Index drop-down** and scan the barcode.
- b. If you don't have the item in hand, you can look it up in **Enterprise** and copy the item ID from there (this is often easiest), or do a search in WorkFlows.



For more information on searching in Enterprise or WorkFlows, see [Enterprise - Searching Guide](#), [Cataloging - Searching Guide](#), or [Circulation - Searching Guide](#).

3. Once you've pulled up the record you incorrectly attached to, click the **Call Number/Item** tab.
4. Click the **title, any call number, or any item ID** so that it's highlighted. In this example, the item ID in question was highlighted.
5. Click **Add to tree** at the bottom of the window.

Transfer Titles, Call Numbers or Items x

Transfer Titles, Call Numbers or Items

Search for:: 33773005226538

Index: Item ID

In this library: ALL

Current: [Yates, David, 1963- --- Harry Potter and the Deathly Hallows. Part 1 --- DVD HARRY --- ID:33773005226355 --- Ctrl#:c](#)

Harry Potter and the Deathly Hallows. Part 1 - Yates, David, 1963-

Records Description Call Number/Item 3

DVD HARRY - BOZEMAN  
33773005226355 - 2 - DVD - CHECKEDOUT - Can't C  
33773005226595 - 3 - DVD - CHECKEDOUT - Can't C  
33773005226538 - 4 - DVD - DVD 4

LAUREL  
DVD HAR FUL - LAUREL  
39705000325471 - 1 - DVD - LOST

MADISON  
DVD HARRY #7 PART #1 - MADISON  
39539000182750 - 1 - DVD - DVD

FPCC  
DVD 890 - FPCC  
33722000401786 - 1 - DVD - DVD

YELLOW  
J DVD F HARR - YELLOW  
33773200258203 - 1 - DVD - LOST

BLC  
JF DVD HAR #7 - BLC  
39530000651639 - 1 - DVD - JUV-DVD

ROSEBUD  
DVD-J 0749 HAR - ROSEBUD  
30629000368233 - 1 - DVD - DVD

NVPL  
YA DVD HARRY POTTER #7 - NVPL  
39517000565554 - 1 - DVD - YA

RCL-MAIN  
DVD JF ROW 551 - RCL-MAIN

Price: \$12.09  
Home location: DVD  
Item category 1: DVD  
Item category 3: FICTION  
Item category 5: none  
Date created: 11/30/2018  
Date last charged: 4/22/2019  
Last discharged: 5/6/2019,19:38  
Date inventoried: Never  
Times inventoried: 0

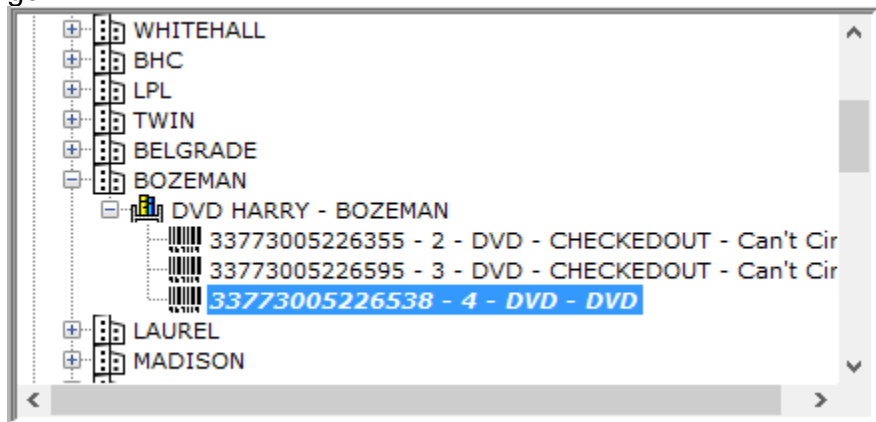
Item type:  
Current location:  
Item category 2:  
Item category 4:  
Previous user ID  
Card #:  
Last activity:  
Total checkouts:  
In-house uses:

5 Add to tree Remove from tree Retain for transfer Transfer Close

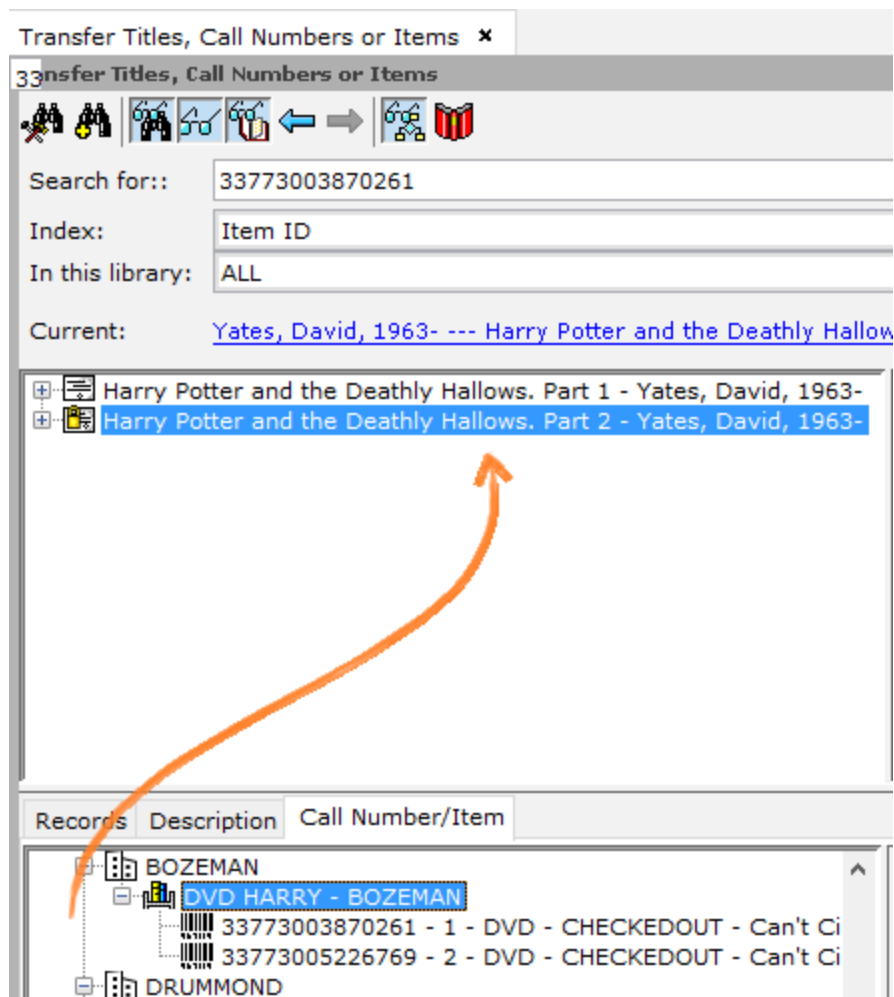
The bib record the item's attached to will appear in the white section below the search fields (aka the "tree").

6. Click the **plus (+) sign** to the left of the record. This will expand it.

7. Click the **plus (+)** to the left of your library (e.g. BOZEMAN) to expand its holdings.
8. Click the **plus (+)** to the left of the call number (e.g. DVD HARRY - BOZEMAN).
9. Click the **item ID** you want to transfer so that it's highlighted.
10. Click **Retain for transfer** at the bottom of the window. This will ***bold and italicize*** the item you're going to move, letting you know it's ready and waiting for you to tell it were to go.



11. Look up the **record you want to transfer the item to**.
  - a. You can look up the "correct" record in **Enterprise** and copy an item ID that's already attached to it (even if it's not your library's copy) and use that to pull up the bib record.
  - b. Or you can search in WorkFlows.
12. Click the **Call Number/Item** tab.
13. Click the **title, any call number, or any item ID** so that it's highlighted. In this example, the call number was highlighted.
14. Click **Add to tree**.



The "correct" bib record you want to attach to will appear beneath the first one you added.

15. Click the **plus (+)** to the left of the "correct" record.



You may find it helpful to minimize the first record that you expanded for less scrolling.

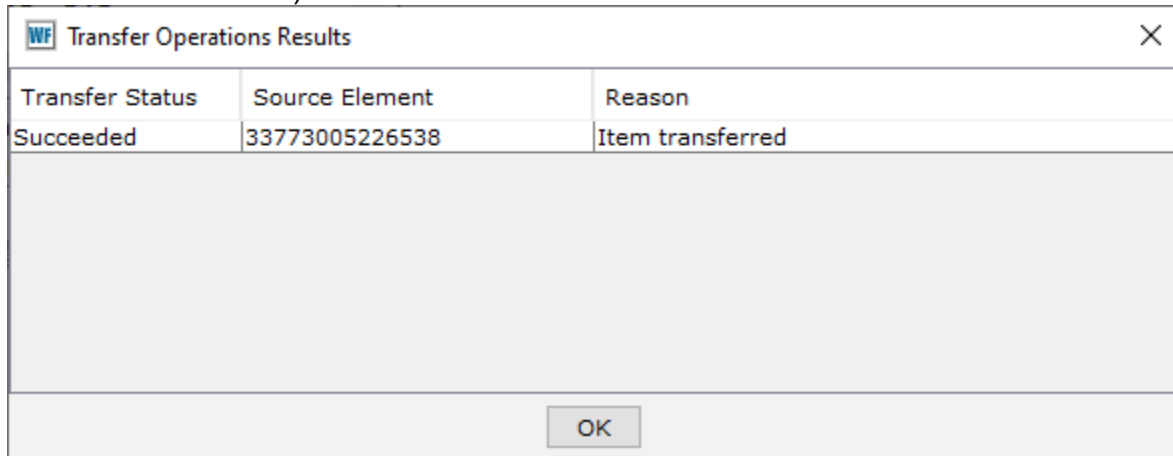
16. Click the **plus (+)** to the left of your library (e.g. BOZEMAN) to expand its holdings.

17. Click the "correct" **call number or its item ID** to highlight it (e.g. DVD HARRY - BOZEMAN).

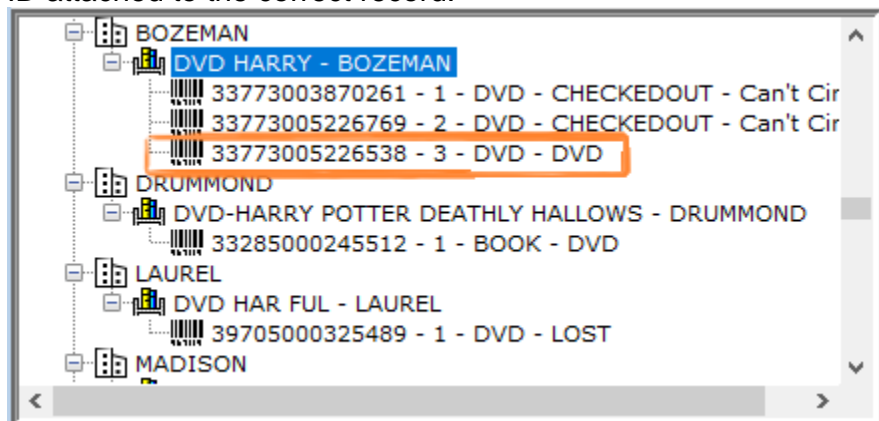
18. Click **Transfer** at the bottom of the window. This will add the item ID as another copy under the call number.



A **confirmation pop-up** will display, depending on your settings (see **Properties - Behavior Tab** above).



19. To double-check the transfer, look up the item ID in WorkFlows; you should see the item ID attached to the correct record.




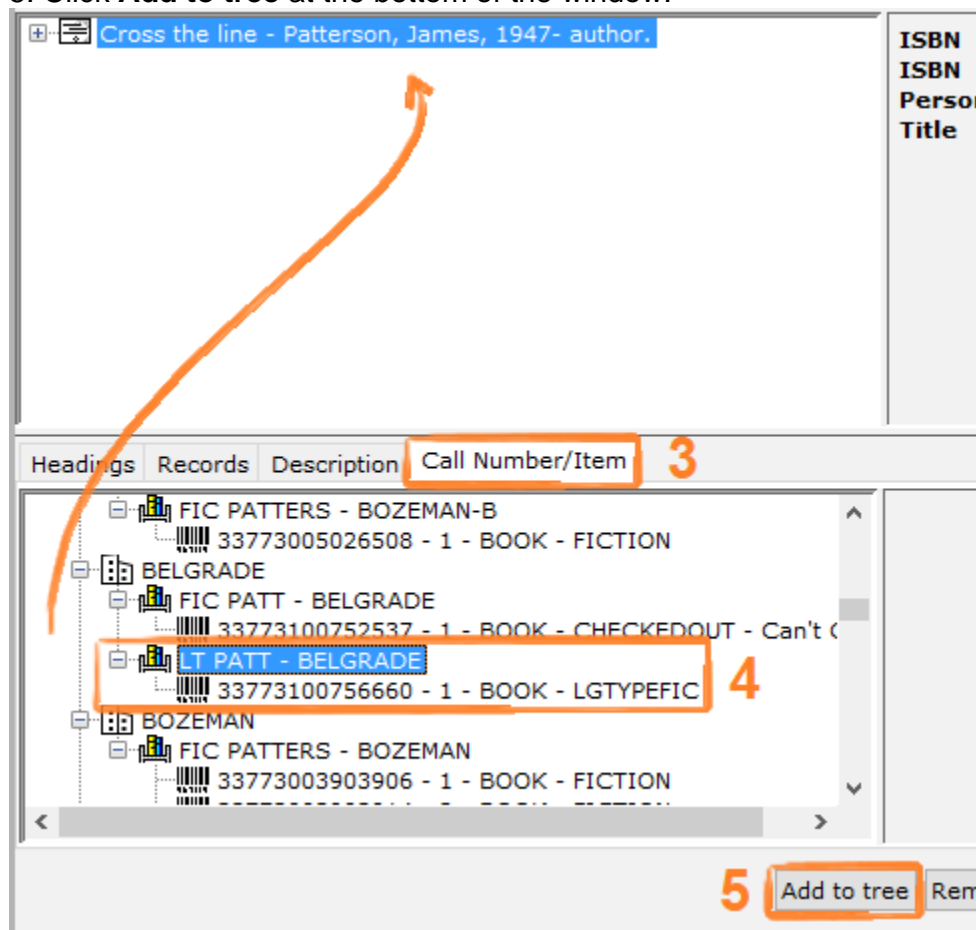
20. If the item you transfer is the **last one on the call number or title / bib**, a confirmation pop-up will display (depending on your settings - see **Properties - Behavior Tab** above) that you'll need to click **Yes** to.

Clicking **Yes** will remove the empty call number and / or title / bib from the system.

## Transferring a Call Number

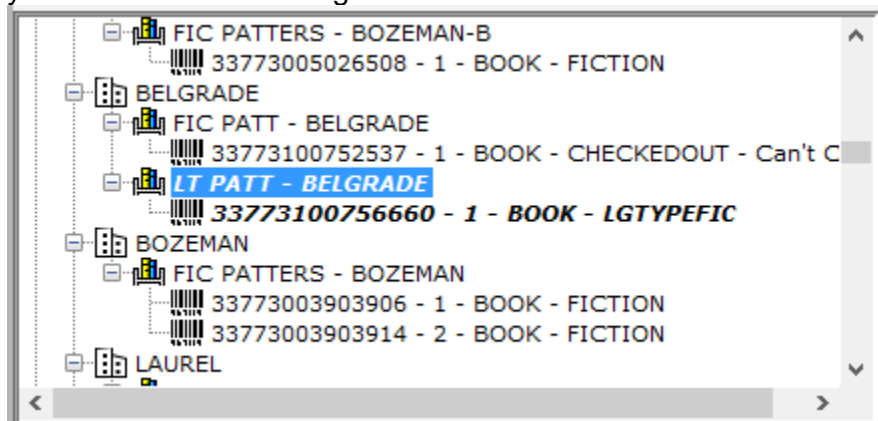
Let's say you accidentally add a large-type version of *Cross Fire* by James Patterson to a bib record that describes the regular print book. Here's how you would transfer the large-type call number (and it's accompanying item ID) to the large-print bib record.

1. Open the **Transfer Titles, Call Numbers or Items** wizard (Cataloging module > Special Toolbar > Transfer Titles...).
  2. Look up the **record that has the call number you want to transfer**.
    - a. If you have the item in hand, simply select **Item ID** from the **Index drop-down** and scan the barcode.
    - b. If you don't have the item in hand, you can look it up in **Enterprise** and copy the item ID from there (this is often easiest), or do a search in WorkFlows.
-  For more information on searching in Enterprise or WorkFlows, see [Enterprise - Searching Guide](#), [Cataloging - Searching Guide](#), or [Circulation - Searching Guide](#).
3. Once you've pulled up the record you incorrectly attached to, click the **Call Number/Item** tab.
  4. Click the **title, any call number, or any item ID** so that it's highlighted. In this example the call number LT PATT was highlighted.
  5. Click **Add to tree** at the bottom of the window.

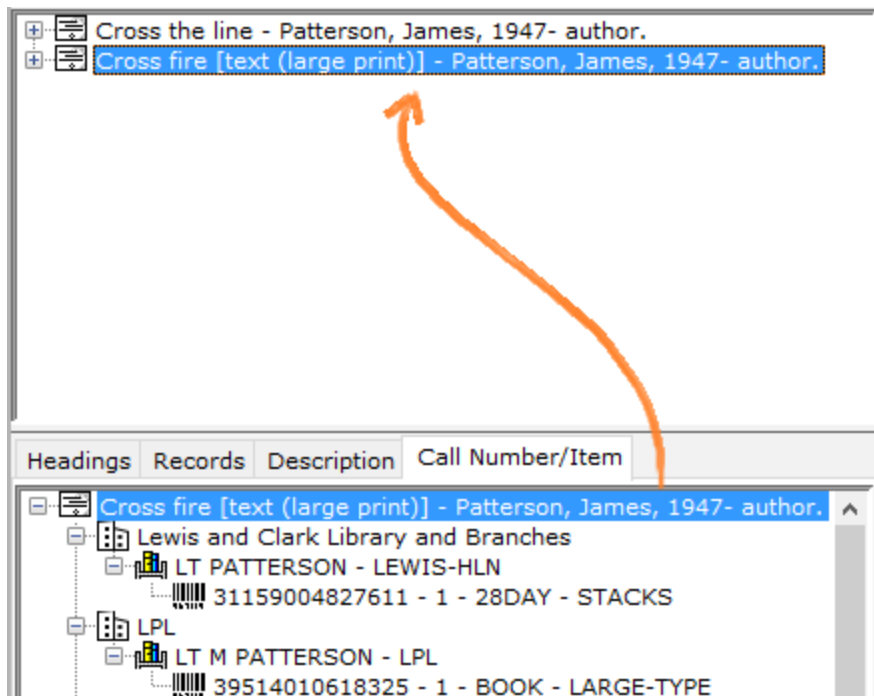


The bib record the call number's attached to will appear in the white section below the search fields (aka the "tree").

6. Click the **plus (+) sign** to the left of the record. This will expand it.
7. Click the **plus (+)** to the left of your library (e.g. BELGRADE) to expand its holdings.
8. Click the **call number** you want to transfer so that it's highlighted (e.g. LT PATT - BELGRADE).
9. Click **Retain for transfer** at the bottom of the window. This will ***bold and italicize*** the call number and its item(s) you're going to move, letting you know they're ready and waiting for you to tell them where to go.

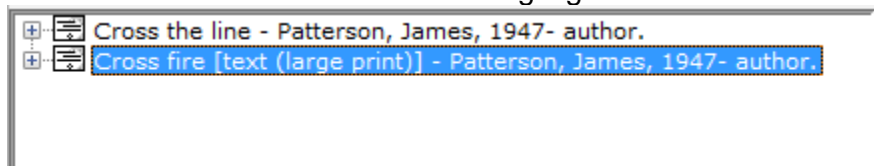


10. Look up the **record you want to transfer the call number to**.
  - a. You can look up the "correct" record in **Enterprise** and copy an item ID that's already attached to it (even if it's not your library's copy) and use that to pull up the bib record.
  - b. Or you can do a search in WorkFlows.
11. Click the **Call Number/Item** tab.
12. Click the **title, any call number, or any item ID** so that it's highlighted. In this case the title was highlighted.
13. Click **Add to tree**.



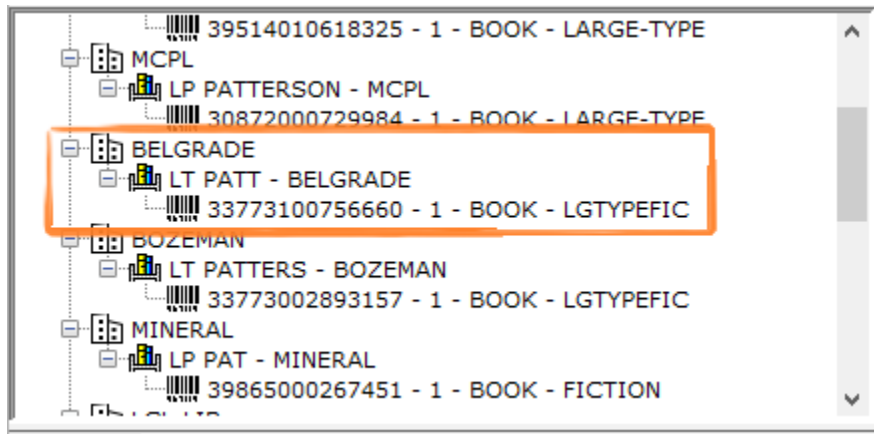
The "correct" bib record you want to attach to will appear beneath the first one you added.

14. Click the "correct" record title to highlight it.



You may find it helpful to minimize the first record that you expanded for less scrolling.

15. Click **Transfer** at the bottom of the window. This will add the call number and its item ID(s) to the record.



A **confirmation pop-up** will display, depending on your settings (see **Properties - Behavior Tab** above).

16. If the call number you transfer is the **last one on the title / bib**, a confirmation pop-up will display (depending on your settings - see **Properties - Behavior Tab** above) that you'll need to click **Yes** to.

Clicking **Yes** will remove the empty title / bib from the system.

## Transferring a Title


Let's say you create a brief title for a book kit that your local book club is clamoring for, like *The Immortal Irishman* by Timothy Egan. Time goes by and you notice that some libraries have attached their kits to the record you created while others are attached to a better, fuller record that includes a preferred cataloging source (DLC), ISBNs, publication information, RDA tags, notes, a contents list, and subject headings, including ones pertaining to Montana.

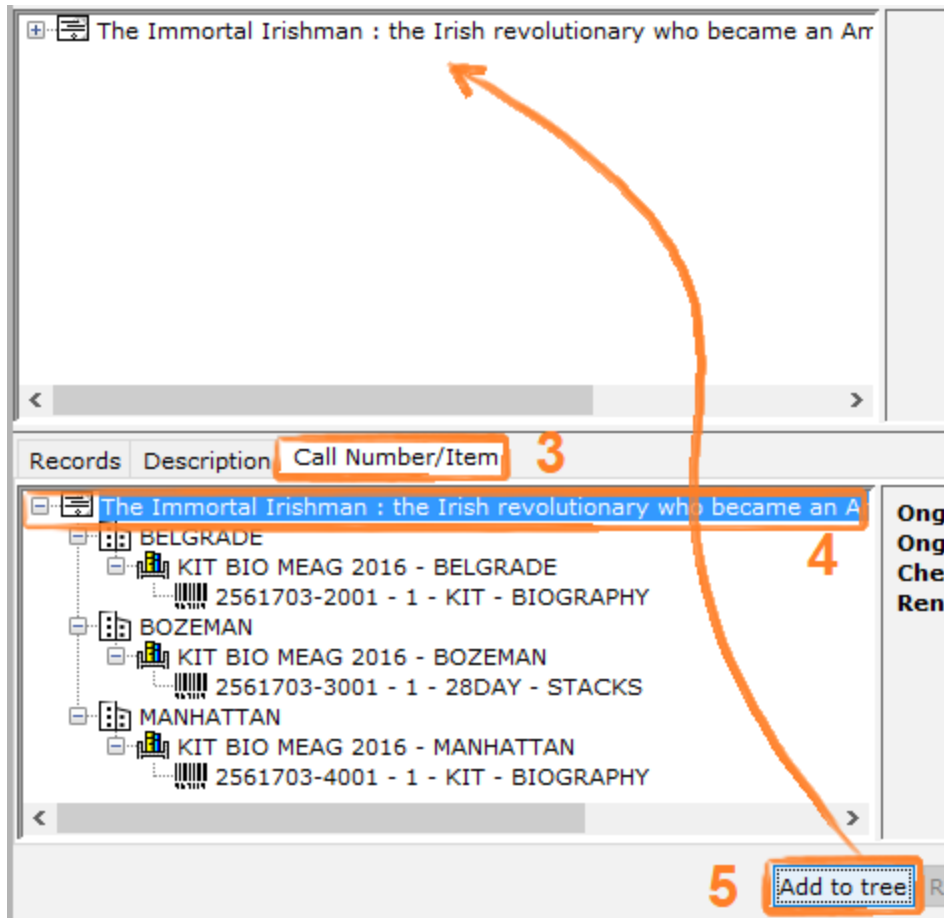
Records	Description	Call Number/Item
<b>Leader</b>	am n a	
<b>Fixed field data</b>	200224n	000 0 eng u
<b>Personal Author</b>	<a href="#">Egan, Timothy</a>	
<b>Title</b>	<a href="#">The Immortal Irishman : the Irish revolutionary who became an American hero [kit]</a>	

Brief record

Headings	Records	Description	Call Number/Item
<b>Standard identifier #</b>	40023013003		
<b>Local system #</b>	(OCoLC)913923705 (OCoLC)940541967 (OCoLC)942556656		
<b>Authentication code</b>	pcc		
<b>Geographic Area Code</b>	n-us--- e-ie--- u-at-tm		
<b>LC Call Number</b>	E467.1.M4 E34 2016		
<b>Dewey Decimal Classification Number</b>	355.0092 B 23		
<b>Other Classification Number</b>	HIS036050 HIS036040 HIS018000 HIS036140 BIO023000 HIS004000 BIO006000 bisacsh		
<b>Personal Author</b>	<a href="#">Egan, Timothy, author.</a>		
<b>Title</b>	<a href="#">The Immortal Irishman : the Irish revolutionary who became an American hero/ [kit] Timothy Egan.</a>		
<b>Publication</b>	Boston : Houghton Mifflin Harcourt, 2016.		
<b>Physical description</b>	xv, 368 pages : illustrations ; 24 cm		

Full record

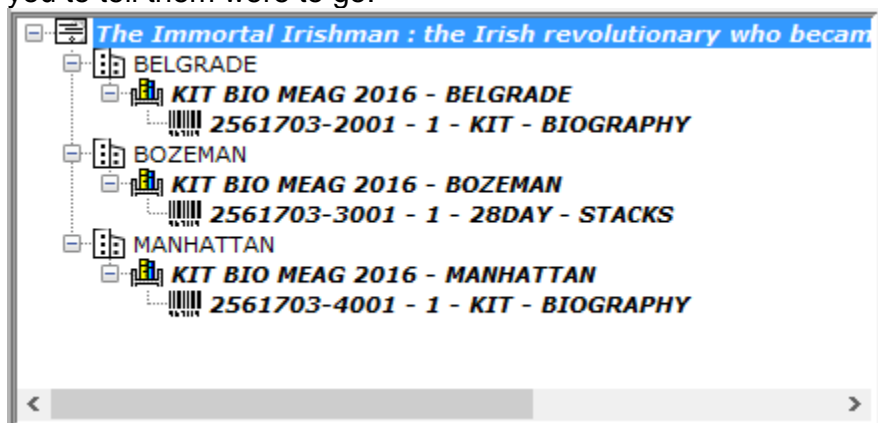
1. Open the **Transfer Titles, Call Numbers or Items** wizard (Cataloging module > Special Toolbar > Transfer Titles...).
  2. Look up the **record that you want to transfer**.
    - a. If you have the item in hand, simply select **Item ID** from the **Index drop-down** and scan the barcode.
    - b. If you don't have the item in hand, you can look it up in **Enterprise** and copy the item ID from there (this is often easiest), or do a search in WorkFlows.
-  For more information on searching in Enterprise or WorkFlows, see [Enterprise - Searching Guide](#), [Cataloging - Searching Guide](#), or [Circulation - Searching Guide](#).
3. Once you've pulled up the record, click the **Call Number/Item** tab.
  4. Click the **title, any call number, or any item ID** so that it's highlighted. In this example the title was highlighted.
  5. Click **Add to tree** at the bottom of the window.



The bib record will appear in the white section below the search fields (aka the "tree").

6. Click the **title** so that it's highlighted.

7. Click **Retain for transfer** at the bottom of the window. This will ***bold and italicize*** the title and all its holdings that you're going to move, letting you know they're ready and waiting for you to tell them where to go.



8. Look up the **record you want to transfer the holdings to**.

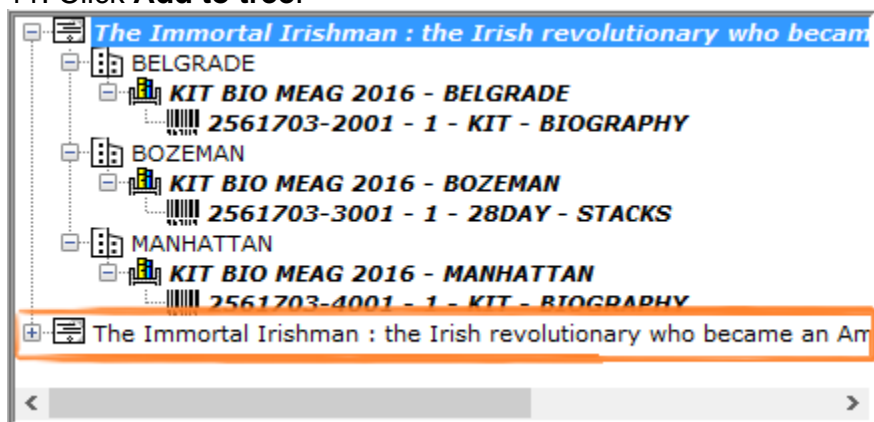
a. You can look up the "correct" record in **Enterprise** and copy an item ID that's already attached to it (even if it's not your library's copy) and use that to pull up the bib record.

b. Or you can do a search in WorkFlows.

9. Click the **Call Number/Item** tab.

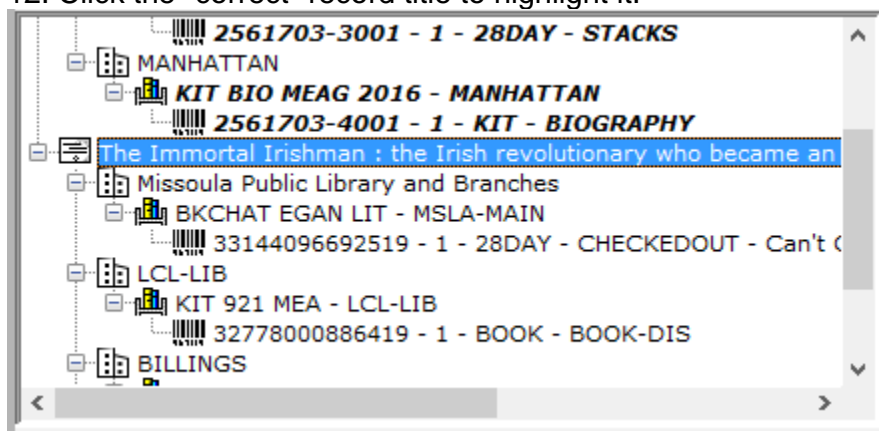
10. Click the **title, any call number, or any item ID** so that it's highlighted. In this case the title was highlighted.

11. Click **Add to tree**.



The "correct" bib record you want to attach to will appear beneath the first one you added.

12. Click the "correct" record title to highlight it.

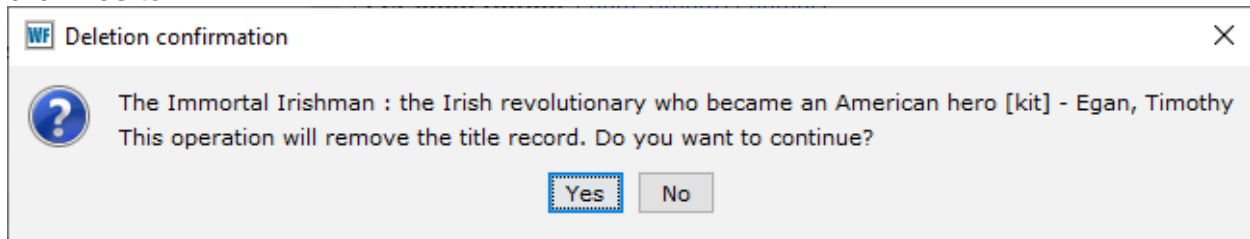


You may find it helpful to minimize the first record that you expanded for less scrolling.



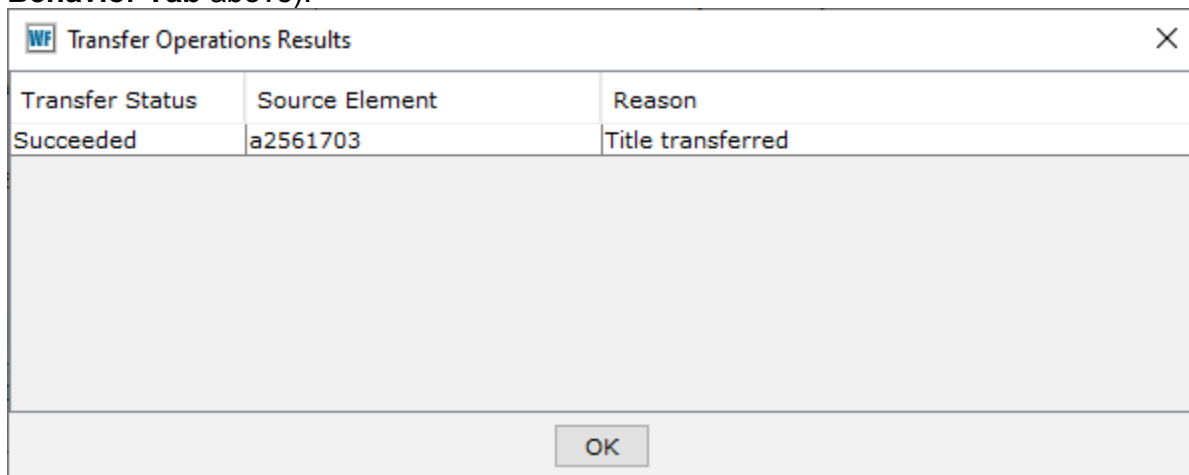
13. Click **Transfer** at the bottom of the window. This will add all the call numbers and item IDs to the preferred record.

14. If you're removing all the holdings from a **title / bib**, a confirmation pop-up will display (depending on your settings - see **Properties - Behavior Tab** above) that you'll need to click **Yes** to.



Clicking **Yes** will remove the empty title / bib from the system.

15. A **confirmation pop-up** will display, depending on your settings (see **Properties - Behavior Tab** above).



## Video Tutorial

### Transferring Items